DOCUMENT RESUME

ED 273 784 CE 044 946

AUTHOR	Garry, Anna; Cowan, John
TITLE	Learning from Experience. A Tutor's Guide to the Use of Small Groups in Continuing Professional Development. FEU/PICKUP. An Occasional Paper.
INSTITUTION	Further Education Unit, London (England).
REPORT NO	ISBN-0-948621-27-3
PUB DATE	Jul 86
NOTE	106p.
PUB TYPE	Guides - Classroom Use - Guides (For Teachers) (052)
EDRS PRICE	MF01/PC05 Plus Postage.
DESCRIPTORS	Foreign Countries; *Professional Continuing Education; *Professional Development; Program Development; *Program Implementation; *Small Group Instruction; *Student Participation; *Workshops
IDENTIFIERS	Great Britain

ABSTRACT

This occasional paper is intended as a practical guide to teachers in further and higher education who are involved in continuing professional development (CPD) and wish to use a strategy of participative workshops. Section I is a brief explanation summarizing the educational justification for the learner-centered approach to CPD. In Section II the design of outline schemes for learner-centered workshop programs is considered. Topics considered include defining constraints, specifying aims and objectives, and achieving the aims. Section III offers specific advice to facilitators on such topics as self-development, using literature and other sources, co-counseling, preparation, digressions, misconceptions, facilitating, documentation, last minute preparations, and conducting the program. Section IV suggests ways to improve a conventionally taught course in a CPD program. An appendix, amounting to approximately one-half of the paper, offers three detailed examples of annotated workshop designs. Each example is accompanied by samples of documentation. In each case, after the opening description, a summary is provided of the process followed in designing the workshop. (YLB)

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An Occasional Paper

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LEARNING FROM EXPERIENCE

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A tutor's guide to the use of small groups in continuing professional development

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CE 044 946

Further Education Unit

Professional, Industrial and Commercial Updating

PICKUP

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ISBN 0 948621 27 3
July 1986

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Printed by Silverdale Press, Hayes, Middlesex

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FOREWORD

i) This Occasional Paper by John Cowan and Anna Garry of Heriot-Watt University is published by FEU as a companion volume to their FEU/PICKUP project report, Continuing Professional Development: A Learner-centred Strategy.* It is intended as a practical guide to teachers in further and higher education who are involved in CPD and wish to use a strategy of participative workshops as suggested in the report.

ii) The main message of both volumes is that in the provision of courses for the Continuing Professional Development (CDP) of adults it is essential to recognise and exploit their store of experiential learning. Participative workshop sessions provide the supportive environment in which adults can develop both their abilities and their confidence. The successful implementation of such a strategy requires teaching staff to adopt a facilitative rather than a didactic role which may be unfamiliar to many teachers of technical subjects.

iii) This handbook seeks to provide guidance to those whose experience of 'facilitating' is limited. The context of the project was the preparation of mature candidates for professional membership of the Institutions of Civil and Structural Engineers, but the method is applicable wherever adult students need assistance in articulating and capitalising on their experience in order to attain a particular goal.

iv) John Cowan and Anna Garry are modest in their claims for this handbook: they readily admit that they learned by

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* Continuing Professional Development is taken here to mean the updating or further educational development required by mid-career adults who wish to maintain or promote their professional standing.

their mistakes and still have a long way to go. Readers may not concur with all the advice they give, and may reject some of the methods suggested in the examples. However, few will challenge the nature of the changes in role that are suggested for this type of continuing professional development.

v) CPD represents a potentially expanding market for higher and further education. PICKUP-type programmes in particular have the ability to relate to this (adult) clientele. The recognition of experience in learning is not unique but necessary to adult students, otherwise they suffer from a 'back to school' syndrome. The facilitation of learning in this way by academic tutors is not necessarily easy, as the authors are prepared to admit. But by publishing this paper, FEU commends it as a good basis for lecturers at least to commence an appraisal as to how effectively they relate to adult learners.

JACK MANSELL
Chief Officer
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PREFACE

As our PICKUP project drew to a close, we found ourselves convinced that activities in continuing professional development work should be learner-centred. We discussed in the report of that project* the changes which this implies for the overall framework within which continuing professional development is offered. In this document we are more concerned with giving direct help to those who will staff such programmes - by considering in detail the implications of working primarily as facilitators rather than as teachers.

You can find much of what we have to say in the literature; so we warn those who already regularly adopt the role of facilitator that they should not expect to find new wisdom in the pages which follow. This booklet simply contains everyday advice about learner-centred activities. We have just thought over our experiences, both positive and negative, and then expressed them in the form of the comments or suggestions which would have been useful to us when we first embarked on our project.

We have tried to write nothing which is idealistic or platitudinous - but simply to report that we learnt the hard way - by making mistakes! We hope that some of the ideas will be of use to you - and that they will help you to make fewer mistakes than we did.

John Cowan
Anna M. Garry

You will find some short passages in this typeface. These are intended as a rough guide to the text, advising you (or warning you!) about what comes next.

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* Continuing Professional Development: A learner-centred strategy, FEU, 1986

SECTION 1: WHY ADOPT A FACILITATIVE APPROACH TO CPD TUTORING?

In the brief explanation which follows we summarise the educational justification for the learner-centred approach to continuing professional development which we advocate. This somewhat pedagogical statement is the basis for the essentially practical advice which follows in later sections. It may be omitted, or deferred until later, by the reader who primarily seeks practical advice.

The nature of understanding

1. It is clear from much corroborated educational research work that real understanding is developed when the learner transfers information or experience from short-term memory to long-term memory. The learning is then stored permanently in the brain by forming meaningful associations with the experiences, knowledge and concepts which have already been stored in the long-term memory.

2. Linkages between the various components of understanding will be created when the new knowledge or experiences are assimilated, or when part of the body of stored understanding is reviewed and consolidated. Since understanding is consolidated in the creation of such linkages, it is obviously difficult (although not impossible) to revise linkages which have already been firmly established. Thus we can be assured that:

   - the body of understanding which a learner already possesses will have a strong influence on his or her subsequent learning. This is comparable to (and probably more powerful than) the influence of the teacher presenting instruction or structuring the learning experience;

- the vital element in the development of deep and meaningful understanding is mental acivity by the learner.

3. The researches of a group of educational psychologists in Gothenburg during the past decade have given us further insights into the nature of understanding. They have shown that even learners who are naturally inclined to follow a so-called 'deep' approach to learning (by seeking meaning through interrelationships and the establishment of a hierarchical pattern of concepts) can be deterred in their purpose by the context in which new learning is made available to them. In particular, any context which depends heavily on external motivation will almost inevitably lead to shallow or 'surface' approaches to learning - to memorisation rather than understanding, and to a lack of awareness of the relationships between concepts.

Learning in continuing professional development

4. Most of the recent studies of adult learning (including those of the Gothenburg group) have focused on undergraduates, either within the context of their courses or as research subjects in specially designed enquiries. There is certainly good reason to expect that the main principles which have emerged will also apply in continuing professional development. But at the same time we should note that CPD involves a number of significant features which are not to be found in undergraduate education. These characteristics are:

- The highly individualised nature of the prior understanding which has been developed by the various members of a CPD group.

  (Although a participant may have no knowledge of a new topic to be mastered, work experience will have firmly established a strong and uniquely individual understanding of many of the concepts to which the new learning will be related.)

- The individual nature of the participants' intrinsic motiviation.

  (The variety of sources and types of motivation is much greater in a group gathered together for a CPD course than in a group of first degree students.)

- The critical nature of the other experiences concurrently occurring in the professional lives of the participants.

  (Work experiences vary markedly with the immediate circumstances of an active professional life - unlike the learner-related experiences in an undergraduate class which are common to almost all student learners.)

5. These features point to the need for a form of CPD provision which will:

   - identify and build on the prior learning of the participants;

   - recognise that the relationships between new and established learning will probably vary markedly within the group;

   - cater for these individual differences;

   - involve each participant in active learning, without which deep understanding and higher level objectives can never be achieved;

   - relate the process of learning to the professional life of each participant, so that it will be influenced by an instrinsic motivation which is meaningful to the learner, rather than by an extrinsic motivation with which he or she has only partial sympathy.

Conclusion

6. We argue that a learner-centred style of provision is virtually essential for situations involving participants who have different fundamental bases of prior knowledge and concepts and who require to extend these concepts in highly individual ways. This reasoning is consistent with the idea of a scheme for continuing professional development which is linked to the workplace and exploits purposeful interactions with colleagues within the wider circle of professional acquaintance. For it is in such situations that it is possible to harness intrinsic motivation to good effect, and to base development on active professional learning.

The status quo

7. In contrast to the model which we advocate, existing forms of CPD provision (and particularly isolated courses or single seminars on specific topics) clearly display fundamental pedagogical weaknesses:

- They do not actively set out to relate that which is learnt to that which is already understood (this is particularly true beyond the specific bounds of the topic being covered).

- No serious attempt is made within the programmes to identify or to resolve the <u>total</u> relevant needs of the learners in that participant group.

- Nothing is or can be done to identify or build on relevant experiential learning.

- All participants are treated similarly; and there is a presumption that their learning is, or should be, of a similar nature.

- Motivation is, by implication, extrinsic rather than intrinsic, and hence encourages superficial learning.

This is why we believe that there is a need for a new approach to continuing professional development.

Learner-centred working, of course, implies that the staff role is not to teach but to facilitate - to make learning easier, more efficient, more effective and more comprehensive. The notes which follow constitute our advice to those who implement learner-centred learning in the context of continuing professional development.

SECTION II: CREATING A SCHEME IN OUTLINE

In this section we consider the design of outline schemes for learner-centred workshop programmes.

We feel that nothing will be gained by expounding in abstract terms the models and procedures which we have found useful in generating ideas for our programmes. Instead we have chosen to imagine ourselves in your company, offering suggestions, asking questions - and indicating what our responses would be if a question stimulated the beginnings of useful dialogue.

8. In all that you do, we advise you to : concentrate on the broad outline first. The objective is to design an imaginative overall scheme which has the potential to achieve your aims as effectively as possible. The first priority is to devise a broad outline for such a scheme. Once you have produced an outline, there will still be much work to be done in detailed planning. But because that depends to a great extent on the decisions which you take about the main features of the programme, our advice about the fine detail is deferred until Section III of this handbook.

9. The real difficulty in producing a scheme is to find out how to begin to create something new, on what is still a blank sheet of paper. Our suggestions about that begin from four distinct starting-points:

- your chosen objectives
- an already established outline
- the approach you would follow in informal counselling
- a germ of an idea.

A different approach is needed when you start from a desire to challenge the status quo.

Each possibility will be explored in turn and at some length later in this section.

10. Whichever approach you follow, you should set out to: assemble the outline of the scheme in the form of linked activities. In all your planning, we advise you to see your programme as a linked sequence of component activities. Sometimes there will be only one or two activities; more often you will have three or four (or even more). Each activity finishes when the participants complete something - when they produce, either for you or for themselves, a tangible output.

11. If you are planning an event which is to be learner-centred, then each output is important - because it should be used by the learner in the activity which follows. And the last output should be the achievement of the aim of the event. An exception to this, for obvious reasons, is found in the transition between the ritual opening ceremonies and the next stage of the programme. The real beginning should be motivating, and should establish a mood of relevance and purpose; the pleasantries should be linked to it, if at all possible, in an unobtrusive and acceptable way.

12. However, you must first define the constraints within which you are operating, in so far as you know them. As the first step in design, we suggest you set down the answers to these questions.

* How much time do you have available for the programme you have in mind?

* What accommodation and facilities will be available to you, if you wish or need them?

* How many participants are you expecting?

* What sort of backgrounds will they come from?

Remind yourself of these constraints at intervals during your planning, just in case you get too ambitious or unrealistic!

13. The next task is to specify your aims and objectives.

- What is your aim in the activity which you want to design?

- Can you express it in behavioural terms? Can you describe what the participants should be able to do before the workshop or programme finishes?

It is important to specify the behavioural objectives as clearly as possible. Think in terms of a tangible result to demonstrate that your aim has been achieved.

14. Obviously you have an aim in mind, however vague it may be, or you wouldn't be trying to devise some way of achieving it. However you need not feel totally committed to this initially chosen aim, in the terms in which you specify it at this early stage. It will often be desirable (for good reasons) to go back go the aim and revise it. Nevertheless we strongly advise you to write down your aim at the outset, and to refer back to that written statement subsequently - even if you believe that what you are trying to do is already clear in your mind.

15. Next we consider possible ways of achieving your aim. Four main strategies were listed earlier. The first and simplest was: starting from your chosen objectives. (Illustrated in the Appendix : Example 1.) When the objectives follow a logical and developing sequence, it is often obvious that the participants can readily be led through a corresponding sequence of tasks. Although such a programme lacks the element of novelty, it is purposeful and necessary, and can generate motivation for that reason.

If no problems are anticipated in persuading participants to respond to 'task objectives', this approach is the simplest and first option to consider.

16. Alternatively you can: start from an outline which is already familiar or established.

* Have you a rough scheme in mind for the type of programme you are thinking of offering?

* Or, have you done something like this before, which can probably be adapted to suit the present situation?

* Or, have you participated in a workshop which was successful for you, and whose scheme might be used here?

* Or, have you read an outline in a book or a journal, where the aims of the author seemed to have much in common with your aims now?

17. Never be ashamed to plagiarise. A good idea can be used more than once, by more than one person. And it's only the foolish or the proud who refuse to accept assistance from the accumulated experience of their colleagues and predecessors. If you have something in mind which is apparently suitable, by all means use it as your starting-point. Then, before you go any further, check through its main features and made sure that it is as suitable as it seems.

18. Be ready to adjust in response to any mismatch you discern between the tentative scheme and your aspirations. You should always be prepared to put considerable effort into adjusting outlines which are, in their suggested form, not quite what you want:

* Will this outline produce the tangible output that you have in mind, and is it in accordance with your aim?

If not, then you should try to adjust the closing stages of the main part of the programme so that they will give you what you want. Then you can also modify the earlier stages to fit.

* Is the style of activity appropriate to your target population and to their prior experience (including their prior experience, if any, with you)?

If not, again try to adjust the activity to meet your requirements. Don't reject - adapt!

* Is the programme linear? Does it move fairly steadily from the beginning through a sequence of events where everything which the participants produce (whether on paper or as tentative conclusions) is used in some form in the next stage of the programme?

If not, try to adjust the programme so that this requirement will be satisfied. It is a critical principle in planning that the output from one activity should be used if at all possible in the next activity.

* Are your participants likely to be motivated by the tasks, challenges or experiences which you are intending to present to them and by the responses they will receive?

Try to assess this realistically, from their point of view. If the outline may seem dull to them, rebuild it around a motivatory component - which you include for just that purpose.

* Have you encountered any apparently insuperable objections to the outline you are exploring?

If so, then don't reject it - yet! Follow through these steps:

(i) Try to express your reservations in the form 'This scheme is unsuitable because ... (a negative statement)'

(ii) Remove the negative word from the negative statement, giving a positive one.

(iii) Advise yourself 'My scheme needs something so that ... (the positive statement)'

(iv) Find a feature which satisfies the advice in statement (iii).

19. After all of this you may still have no scheme in mind. For often, of course, we are not in a position to draw on past experience, or to imitate a useful model. In these circumstances we have to start with what is virtually an empty sheet of paper and stimulate ourselves to be really creative. Fortunately the piece of paper need not be completely empty - provided you have begun as we suggested by setting out your statement of aims or objectives in a form which specifies what you think the participants should have done, or should have learned, by the end of the programme.

20. The third suggested starting-point was: <u>plan on the basis of how you would deal with an individual contact</u>. (Illustrated in the Appendix: Example 2.)

* If you were sitting in a room with just one of these participants, and if your aim was as you've stated, can you think of the steps you would follow to get her or him to achieve the aim?

* Can you work out the most logical order for these various component activities?

* And can you think of how you would outline what you would propose to do in your introduction?

If so, then you are almost in a position to draft a suitable programme for a group.

21. For example, in our project we used many individual interviews to establish how we would achieve our aim with one participant. We began by introducing ourselves and our intentions and we asked our interviewee to talk about:

- the circumstances in which he or she worked;
- professional development needs of which he or she was aware;
- the type of assistance required in order to achieve them.

We found that it then sometimes helped to double back over the process, condensing the information given and hoping that this might prompt our interviewee to add to the record.

22. So much for the interview - an event with one participant. But in a workshop or structured group, we cannot talk to each participant individually all the time. So we must create tasks which will encourage participants to draw out the information which we need from fellow participants. We can ask them to jot down their initial thoughts and then share these thoughts with others, in small groups - or perhaps even in pairs. We can encourage discussion by using small groups which bring together two or four people and call on them to reach a consensus of opinion. We can even exploit these situations, because the lists of needs which they produce will now be anonymous - and will not necessarily indicate which weaknesses relate to which particular person. And a small group can be supportive and reassuring when the members of it discover that others are in a similar position to themselves.

23. Many of our CPD programmes begin with a workshop in which we obtain:

- a carefully refined statement of the expressed and felt needs of the participants;

- a definition of the constraints within which they must operate;

- their own self-assessments, on an individual basis, of their professional potential;

- individual statements indicating the emphases which each would bring out, for herself or himself, in the above lists.

We often use individual interviews as our starting-point in creating a programme scheme. Interviews can suggest component workshop activities in a shadowy outline form.

24. We still have a fourth suggestion for scheme design, for you can: work outwards from the germ of an idea. (Illustrated in the Appendix: Example 3.) Maybe you have been unlikely so far. Our previous suggestions may not have proved fruitful; sometimes we can specify our aim fairly precisely, but cannot see how to get there - whether it's with one participant or with a group of participants. Yet you may still have some useful ideas, at the back of your mind. Here is another possible way to dig them out:

* Have you got a vague idea for a relevant workshop task, which just might be suitable - although you can't quite see how?

* Is it the type of activity which doesn't directly lead to the aim which you have in mind, but which clearly asks the participants to be active in an area closely associated with your aims?

If so, start building around it. This can best be explained by another example.

25. We were dealing with participants who were required to write essays for the Institution of Civil Engineers Professional Examination, on topics related to the engineer and society. We had identified that many of the bad essays which these participants produced arose from a failure to comprehend the demands contained in the questions. We devised what we thought was a neat strategy for analysing questions and breaking them down into their component parts. Our aim was not, of course, to help our participants to analyse the questions - we eventually wanted to help them to answer the questions as asked, and to do so effectively. Yet we built up a workshop programme around the initial idea of analysing the questions.

26. The problem which confronted us in designing an effective workshop was to build on the vague idea of a group task, while at the same time relating it to our ultimate aim for the workshop concerned. We found that this can be done - by trying to make the fill-in sections fit both the expected starting-point and the desired aims (an example of this is given in the Appendix: Example 2).

27. The strategy which we follow is to take a situation where we have an idea for a task, or an experience for the participants - and where we already have a firm statement of our aim. We fill out the detail of the activity we have in mind, and then work out how we would introduce it, what the participants would do, and what they would produce.

28. Try applying this strategy to your problem, then go on to think of how you could take up the outcome which they have produced or generated, and how you could build on it, or react to it, or ask them to work on it - until eventually you move towards the achievement of your aim. It may well be that you will then have to modify that aim slightly. Equally it may transpire that the central activity which you have in mind, although motivating and interesting, is not likely to prove a useful way of achieving your aim. So be prepared for the drastic step

of going back to the drawing-board sometimes, seeking another entirely different idea. But if a particular suggestion does seem to have potential, you should work hard on the links which will take you from the outcome generated by your idea to the aim of the workshop. Do your best to make it fit, and make it work.

29. Finally, for a different type of purpose, you may be interested in challenging the status quo. (Illustrated in the Appendix: Example 3.) This heading covers situations where you want to incorporate demanding challenges in your programme. These are necessary on occasions, and need to incorporate special design features.

30. You will use this form of activity when, for one reason or another, you feel that participants should be prompted - or probably jolted - to reconsider a situation which they accept with complacency. Until they have reconsidered, and, you hope, moved to a new position, you can have no firm objectives in mind - as you do not know what new position they will take up. But you can have the (vague) aim of facilitating reappraisal. (In an extreme form, this type of outline challenges the status quo; a less demanding but similar form, which we will consider later, merely calls for the declaration of felt needs which have hitherto not be considered overtly.)

31. Ask the following questions:

* Having looked at your aim, do you feel it will be necessary at some point to provoke your participants to question the status quo?

* Would it be true to say that you feel the participants need to be jolted? If so, about what?

* Have you any ideas about the kind of experience which might provide this jolt?

* Or, do you wish to confront them with the fact that their present performances are substandard, or their aspirations unambitious?

* Or, do you wish them to scrutinise themselves with more thoroughness and honesty than hitherto, leading to frank personal exposure which may make for a more realistic and motivating starting-point in the activities to follow?

If as a response to any of these you have a tentative idea for an experience which will provoke reappraisal, then you should begin to work on it rather as we suggested in the previous line of attack. But bear in mind that this type of scheme or a workshop introduces considerable difficulties in creating links between the key (jolting) activity and the final achievement of aims.

32. Assuming that you want to produce a jolt, but haven't worked out how, another question is:

* Can you think of any way in which you can encourage the participants to volunteer acceptance or approval of the status quo, and <u>then</u> show them clearly and convincingly that their verdict was wrong?

33. Here's an illustration of what we mean. We were helping a group of engineers who were preparing for an important examination on which their chartered status would depend. A major feature of this examination was the need for them to be able to generate a number of distinct and viable design options, in respect to a given brief. Our particular aim was to help the participants to carry out this creative task effectively within a relatively short time, and in response to a brief which they had not previously seen.

34. We found it easy to persuade them to talk about how this type of task should be undertaken, to share their ideas

with each other, to enthuse over descriptions of tactics which seemed likely to be fruitful, and to exchange long-discussed solutions to much publicised questions from previous papers. But our aim was to help them to do this competently on their own - and in the novel circumstances of the examination. And we had the feeling that they would find this difficult - although they did not share our concern!

35. We therefore arranged, suddenly and without warning, a short session in which the participants were confronted with a completely strange question, and required to carry out only the first parts of the examination task. We gave them sufficient time, commensurate with the amount which they could have taken during a one-day examination in which there was much more than this one task to be done. Then we asked our participants to stop working and we injected, as an input from ourselves, a set of checklists which would differentiate 'similar' from 'distinct' design proposals. We also arranged for a brief input which, by indicating the characteristics required in a 'viable' solution, would implicitly discredit unacceptable solutions!

36. We asked the participants to carry out their own self-evaluation of what they had produced, and allowed them free exchange of reactions with their neighbours, in an unstructured way. Then, through structured small group work, we invited groups to define priorities for the workshop time which remaind to us on the day in question.

37. This situation generated passionate demands for fulfilment of aims which we had in mind from the beginning, but which had not been expressed or perhaps even felt by our participants up till then. It only remained for us to find a natural transition from the statement of needs, through facilitated experience, to the achievement of aims. Fortunately we had considered this already, and had built up an outline for the total workshop programme working outwards towards our aims from

the 'jolting' activity, and back towards our participants' needs as the starting-point.

38. If we analyse this form of workshop, we can pick out two features which are worthy of attention. The first is that the key activity is to some extent split into two. It begins with a cosy and comfortable section, in which the participants express satisfaction with the present situation - in the case of our example, with their present competence. The second section begins with a sudden change of mood which leads to an irrefutable demonstration that the status quo is not as had been thought. Thereafter it is left to the participants to conclude that this is <u>their</u> opinion; for that verdict cannot be imposed on them from outside.

39. The second feature is that the output from this activity will be an extremely personal one, and will vary from group to group and from person to person. Consequently you cannot presume that it will point directly or neatly towards the aim which you had in mind. So you may have to be prepared to generate a sequence of activities during the workshop which will respond to the outcome (whatever it is) and will build on it, and gradually move from there towards your ultimate aim.

40. This type of workshop <u>can</u> be extremely fruitful - but it calls for careful and thoughtful planning and sophisticated facilitation, including consideration of the various outcomes which it is likely to generate. (An example of this type of design is to be found in the Appendix: Example 3.)

41. Exposing felt or normative needs is a particular example of the type of workshop described above. It, too, is based on a provocative activity which is designed to lead to personal exposure - and to the sharing with others (although not necessarily with the facilitator) of thoughts and fears which are not normally volunteered.

- Do you feel that this is necessary in order to achieve your aim?

- Can you specify the type of thoughts and feelings which you would like to unearth?

- Can you think of the type of pressure (definite, but not too threatening) which might well provoke people to make such an exposure, perhaps because it is the only way to explain their behaviour or the illogicality of their answers?

- What sort of situation would be one in which that type of pressure could be created? And how could you, as a facilitator, create it?

If you have satisfactory answers to these questions, you should be well on the way to designing an activity which will provoke the type of personal exposure you are seeking.

42. For example: our experience in the project convinced us that a considerable proportion of those who enrol for formal CPD programmes hope that <u>something</u> in the programme will provide a discipline which will sustain a regular commitment on their part. They look to the facilitators (in some cases almost in desperation) for a 'magic something' which will generate motivation, confidence and even hope.

43. Where these views have been expressed by one or two participants, others in the same group may volunteer strong agreement. Having crossed that hurdle, devising a co-operative discipline and a mutually supportive environment to help them to achieve their hopes is possible. But these extremely personal and almost intimate weaknesses are unlikely to be declared in the normal context of a workshop activity - without prompting.

44. We found a way around this problem. When such a group makes a commitment to an programme which entails 'homework' between one meeting and the next, many will inevitably fall by the wayside. Some lack motivation; some are hesitant to table work which they fear may be substandard and likely to be regarded as such by the facilitator or other participants; and some do not know how to make an effective start and are reluctant to seek advice. In these circumstances (apparently as a departure from the planned programme), it can be highly stimulating to the group dynamic to 'break in' and point to the discrepancy between commitment and expectations on the one hand and performance on the other - and to ask why this should be so. Responses can emerge honestly and anonymously, if you ask for an aggregation of responses from the members of the group. These responses can then be used as as basis for further frank discussion and total planning with regard to the fine detail of how the next task should be facilitated, and how it should be carried through.

45. The facilitator, having provoked the individual's personal exposure (which is likely to be of a critical nature), should be in a position to build on that exposure and to offer hope and promise for the future, and thus transform this into a constructive experience before the workshop is completed. Having taken the participants down into the depths, the facilitator must devise a response which will show them that they can plan in their own strength, and that they can achieve more than they had thought. The way is then open to build on the negative aspect of the personal exposures, and to do so (positively) as soon as possible.

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SECTION III: SPECIFIC ADVICE TO FACILITATORS

Self-development

Facilitating is a new style of working for most of us. Consequently all staff, ourselves included, should recognise the need for their own professional development - and we should make conscious provision for that to happen.

So don't allow your planning to concentrate only on the immediate needs and demands of your participants. Once you have defined the objectives of your programme, take time to identify your own personal objectives as a facilitator. And then take charge of your own professional development, for it is unlikely that anyone else will do so.

It is, therefore, with the topic of self-development that this detailed advice begins.

Using literature and other sources

46. Allow yourself time for the reading, questioning and discussion which will underpin your development as a facilitative tutor and help you to achieve your aims. Distinguish between this reading and that which you require directly to enable you to assemble your programmes.

47. Identification of needs will be a key issue in all that you offer. Beware of presuming that you know the needs of any particular group; these should always be actively unearthed. For this reason it will be helpful for you to expand your reading of the structured experiences which are used by group facilitators. When you are doing that, concentrate particularly on techniques which are cost-effective in identifying or disclosing needs. And appreciate that, although your participants will often arrive with declared needs, they will also bear felt needs which they do not necessarily wish to expose in

company. Often, in addition, they will have important needs of which they are as yet completely unaware, in relation to a professional norm.

48. Each class of need calls for an entirely different approach from you, as the facilitator. You must find out how to respond adequately and appropriately to each type, in situations where you are likely to be confronted by heterogeneous accumulations of needs which are a confused jumble as far as the participants are concerned.

49. When you are looking around for suitable titles to study, constantly look to other professions and to situations different from your own. You should try to identify formats, working styles and methods which have been used somewhere, by someone, for events which centre on real needs, and on other types of aims which are important to you. There are not many such examples - but there <u>are</u> some. Try hard to translate ideas into a form which will be suitable in your situation. Concentrate on methods and principles rather than on fine detail. Often that effort can be well worthwhile; and it becomes easier as you learn to 'translate' from one type of situation and discipline to another.

<u>Co-counselling</u>

50. We have found it useful, if not almost essential, to find someone with whom we can debrief our experiences objectively and introspectively - and for whom we can adopt a similar role. We suggest that both aspects of co-counselling can make a major contribution to your personal development. And we advise you to begin the process as early as possible - preferably by using a colleague to help you to focus on your planning <u>process</u>, for a start.

<u>Preparation</u>

Now let's think about the specific demands on you, in a particular situation. It's time to consider how you will

prepare to implement a programme as a facilitator. And our advice here is not influenced by whether or not it was you who prepared the broad outline.

You will find that, in the preparatory stage, many of the details of that broad outline are still likely to be modified or even changed - as a result of the planning of the fine details, with which this section is still concerned.

Please treat the suggestions which follow as an accumulation from which you should pick and choose, after carefully considering each idea. Some will be irrelevant or inappropriate in your particular situation. But all have been relevant to us - at some time. So do not reject anything too quickly.

First steps

51. Always begin a CPD workshop by doing all that you can to identify the real needs of your participants. Admittedly you may sometimes be able to do that even before you begin; but in CPD you will more often have to open with an activity which will elicit needs from a particular group of participants. Either way, the identification of needs must be your first priority.

52. Even if your programme outline has been decided, it is still worthwile to meet beforehand in one-to-one interviews with people who are similar to your prospective participants. Give them a personal version of your needs identification programme and make copious notes while you do this, or afterwards. Identify the questions which trigger off useful responses from them and the patterns of conversation and priorites which emerge. These are likely to be useful themes to consider - or to avoid - in your activity for a group.

53. Look for meaningful ways to summarise what you find; look for patterns of behaviour. Then expect your activity to develop around similar patterns with the interactions

between the participants generating the type of conversations which, in the interviews, were initiated by your questioning. The details will vary from person to person - but patterns are more predictable, and a more useful framework for your thinking, than detailed records.

54. Especially be on the look-out for the 'trigger questions' which you find effective in the interviews or elsewhere. Try to note colloquial phrases or wording which prove meaningful to a participant; and be ready to use these notes to influence the way you communicate during the next event.

Digressions

55. In the early stages of an opening workshop, there will almost certainly be digressions, whether you plan for them or not. So try to plan for them! Accept it as inevitable that most participants in CPD activities will have a desperate need to tell people something - anything! - which will make their audience value them. Since they will usually insist on doing that before they settle down to the business which you have in hand for them, it is useful to be able to allow them a 'space' in the programme where the structure encourages individuals to declare their relevant (and, to them, important) experiences. They will win respect by so doing - even if only in their own eyes. And if you don't make provision for this to happen, it will probably happen anyway - and will disrupt your carefully prepared programme.

Misconceptions

56. Remember that you will also have to be on the look-out in these early stages for misconceptions which are already firmly formulated in the minds of the participants. In our experience it can be very difficult to persuade them to listen to, and to accept as accurate, the values and requirements of any professional body whose accreditation

or approval they are seeking. For they will come to the learner-centred activity with their own firm views of these values and requirements. These will have been formed partly in conversation with others of their own age and circumstances and partly as a result of advice from senior colleagues. And often the senior colleagues are badly informed, or out of date!

57. Experiential learning is easier to acquire than it is to eliminate. Consequently you will find it difficult to shift such misconceptions in order to introduce valid (but new) values. Plan your presentation so that their existence is revealed as early as possible. This can seem counter-productive when it leads to misunderstandings and querulous questioning, but it is necessary. Indeed you may have to resign yourself to attacking the problem iteratively (perhaps three or four times in all) during the course of your entire programme.

Facilitating

58. Read as much as you can about the skills of leading small groups, and remind yourself to differentiate carefully between instructing (or teaching) and facilitating. Professional development, being built on experiential learning, will only be meaningful when the learners react to the experiences which you offer or arrange for them and relate them in their own way to their prior experience. There is no real place for an instructor in that process - only for someone who facilitates. This entails helping the learner to learn or (at times) explaining something in response to particular enquiries (overt or covert).

69. Facilitating is thus not an easy role to take up, and especially so if all your experience has been in teaching. It is an ability which you can acquire through your mistakes. That is why you should arrange to learn quickly and purposefully, by keeping records before and

after each event and by devoting time to objective formative evaluation - even to the extent of persuading one of your colleagues to undertake this for you, on specific occasions.

Drafting documentation

The notes here are illustrated to some extent by the addenda documents which are included in the Appendix. They are also amplified later in the next part of this section, which deals with finalising the documentation.

60. Begin by making sure that the target population for the programme which you are to offer is clear in your mind and will be accurately described in your documentation. For there is nothing as bitter as the criticism of someone who has come to an event which is not suitable for him or her, and who resents both the subsequent waste of time and the embarrassment. Even where the fault is the participant's, the blame will probably be ascribed to you. Try to minimise the risk of this, and the consequences of it. Check what the publicity already says about aims and target populations - and plan what you write from now on, from the viewpoint of a prospective client.

61. Now prepare the key statements for the documentation and the participants' notes. Again, do this in your own words and style; and remember to describe to the participants what they are to do. It is well worthwhile taking time to draft and check out short, clear and accurate task statements and output descriptions.

62. Formulate tasks which make use of summaries, produced either by individuals or by small groups. The act of summarising helps us all to gather our thoughts together and to reflect on their meaning. These summaries can then be passed over to others for comment or discussion, if that is appropriate (see samples of tasks in the Appendix). That process will be more effective if you create tasks which encourage participants to use their

own vocabulary to describe processes, needs, achievements and learning. It is then easier for them to report honestly, comprehensively and meaningfully, as the effort will not be obscured by the temptation to use formal language.

63. Even at this preliminary stage you should begin to detail your own actions and commitments very precisely, and in your own words. Work out exactly what you will do and what they will do, in segments of no more than five minutes or so throughout each 'activity' and for the entire event (see Staff Outline Notes for Examples 1 - 3 in the Appendix). Make a detailed schedule, in your own style and for your use only. And leave space on it so that you can add notes during the event as you go along - to remind yourself of what happened when you had to deviate from your planning. Naturally you will not be able to adhere rigidly to your idealistic timetable - but reflection on why you made the changes (and <u>if</u> you should have made them) will help you to focus your debriefing. It will help you to plan much more effectively (and with more realistic estimates of time) on the next occasion.

<u>Accumulating data</u>

65. Search for relevant information which is available in the area where you will be working, and especially for the data which you anticipate participants will request or expect to receive either from you or from 'the system'. All of this should enable you to build up a coherent and accessible data base, covering particularly;

- the CPD provision which already exists and is accessible in this and associated areas;

- the routes by which participants can reach tangible goals (such as qualification or chartered status);

- the answers to the detailed questions which participants are likely to ask about the

requirements of the appropriate professional bodies;

- responses to wider and general questions (which amount to requests for career counselling).

65. Ensure that, from the beginning, you keep full records of questions which are commonly asked at the planning stage and (later) during and after activities - and devise a system which will seek out useful answers. Note also any questions for which your answers are vague, ambiguous, incomplete, unknown or unsatisfactory; you will want to make sure that you are able to give a better answer on the next occasion they are asked.

66. While accumulating your data base, you should be wary of second-hand reporting of the advice and requirements of professional bodies and others. We found it <u>essential</u> to check and corroborate constantly, because significant misinterpretations or misreporting were quite common.

67. Finally, remember that the professional situation is dynamic and so your data base should be constantly revised and extended. Lay your plans in such a way that this updating and expansion can happen without interference or disturbance; think out a routine to achieve this.

<u>Finalising the documentation</u>

After the event participants like to know that they will have ample handouts (although they may not ever use them) and many facilitators nowadays use a workshop style which involves a considerable amount of paperwork during the event. The documentation is thus an important aspect of the workshop approach. It is certainly one which we felt <u>we</u> mismanaged, through overenthusiasm perhaps, in the early days of our project. So we stress to you that the purpose, style and amount of documentation should be carefully considered.

General papers

68. Begin with aims. You must check your drafts to ensure that you declare clearly within your documentation what you will, and will not, offer. You should not be afraid to state that there are some needs which you will not be able to resolve.

69. Next, you should include a brief specification of the role you will adopt, and the methods you will try to follow. State in simple terms that you see yourself as a facilitator who will try to respond to the pattern of needs which emerges as the work proceeds, and not as a 'source of all wisdom' or solver of all problems.

70. State what you will take authority for. For instance, you may decide that your programme will contain certain elements, even if they provoke adverse initial reaction. If you have decided to take authority for that decision, then you should make that clear at the outset in case participants are disappointed or irritated afterwards because the event was not as flexible as they had presumed. Similarly you should also identify where there are decisions which are negotiable.

Amount of documentation

71. You will be well advised to issue paperwork only at times when it will advance the progress of the participants. Try to prevent participants from reading something too early and spoiling an effect which you are working towards - or reading the paperwork after the event and failing to give you the attention you feel you should be having during the next part of the programme. Remember that a profusion of separate pieces of paper, issued during the event, can be demotivting or daunting for many workshop participants. So try not to adopt programmes which depend on giving the participants too many separate pieces of paper or handouts.

72. Especially beware of giving out large packs of handouts early in the programme. For if you lose eye contact with your participants (because they are reading) then you will lose much other contact as well - and perhaps with disastrous long-term effects.

73. We believe that there is much to be said for issuing minimal documentation during the event, for the provision of preliminary reading long beforehand, and for support material issued at the close of the event. But whatever you intend to do, give the participants advance notice of the documentation which they will have accumulated when the programme is complete. This avoids the situation where they may feel obliged to make voluminous and unnecessary notes as the workshop proceeds.

Facilitating in practice

We'll assume that you've completed your preparation - whether it's for an initial activity or for a workshop which is to take place well on in an established programme. Now you should turn your thoughts towards how you will work and behave - in the hours before the workshop begins, during the event and immediately after it. The notes which follow are again a summary of our advice to ourselves, in that type of situation. We reiterate that we don't regard these statements as words of wisdom from expert or experienced people to a novice; we are merely describing as accurately as we can the steps which we still try to follow when we offer a workshop or a small group event.

Let's work through an event, then - step by step, and beginning with the preparations which take place in the last 24 hours or so.

Last minute preparations

74. It is you who must be completely convinced during the event about the format and aims; and you must feel that the programme 'belongs' to you. So it is you who must

assimilate every part of the intended programme, to the extent that you can picture in your mind precisely what you will be doing and how the participants will be behaving - and you should have that thinking in a readily accessible form.

75. Do this by thinking through your programme again, in fine detail - especially if the outline was prepared by someone else, or if you prepared it with a partner, or if you prepared it some time ago. Add last minute notes in your own writing (and certainly in your own words) to the staff outline. Continue to shape the fine detail this way until the last minute, so that it fits in more and more closely with <u>your</u> style, and feels comfortable <u>and familiar</u> to you.

76. Picture yourself at work in each section of the activity or event. Ask yourself these questions, and try to answer them - because they may prompt you to add further notes to your outline:

- what will the participants expect of you?
- what will you need to know, or what may you be asked?
- how will you organise each part of the event?
- what layout should be arranged in the room, with regard to seating, positioning of materials and so on?
- how will you prepare and organise all your resources beforehand?
- what possible distractions may occur, and how can you avoid them? (For example, you should make sure that the spare handouts will be located in such a position that latecomers do not help themselves to unused handouts as well as those which have already been distributed.)

77. Again, break down the 'event' and divide it into 'activities'; concentrate your thinking on the outputs from each activity which are to be the inputs to the next. Make especially sure that the overall output will be presented clearly throughout the workshop as the ultimate aim - both for you and for the participants.

78. Give thought separately to checking the times you have planned for each activity, and for each part of it. Note them clearly on your draft outline - with running time totals, so that you can monitor your progress as you go along. Anticipate the existence and consequence of delays, and leave space to make brief notes to remind yourself of why they happened.

79. Think of your participants as individuals who will work within a group, and not as a group within which there are individuals. Make yourself familiar with all the background information which you have about each participant in your group. Arrange to have your notes on this readily to hand, without them being noticeable to the participants, so that you can remind yourself of anything you have forgotten.

80. Despite all that we have said about preparation and the implications of finely detailed planning, ALWAYS SEE YOUR STRUCTURE AS FLEXIBLE. AND BE PREPARED FOR SURPRISES TO WHICH YOU WILL MAKE AN APPROPRIATE RESPONSE, PLANNED OR NOT.

<u>The event itself - and your pre-planned initiatives</u>

Again, we think the best way to be of assistance is to list the steps which we follow. We concentrate first on decisions which can be taken beforehand, and put into practice during the event.

81. Be there in time to carry out your last minute preparations and check furniture and facilities before anyone arrives. Then mix with the participants - easily

and naturally (in your own way, and not necessarily as you have seen others do it).

82. Think carefully about when it will be appropriate to stand and when to sit - and how and where. Think also about where to position yourself, and about the impression which that will give. Think about what you should wear in relation to the dress of participants and the atmosphere you wish to create in your workshops.

83. Once you are seated, you will want to keep the plan, your reasons for it, and the timetable, physically at your fingertips - just in case your mind goes blank. You will also be well advised to have your handouts carefully set out, so that distributing them will not cause delay or be obtrusively fussy.

84. Begin the formal part of the programme decisively. Introduce yourself, the participants and the programme. Use some structured way of encouraging the participants to introduce themselves, or each other, without embarrassment.

85. Throughout the programme, take the ultimate authority for timing and for structure. Although you must be prepared to be flexible, you must also make it clear that <u>you</u> will decide:

- when to start
- when to finish
- when to make changes

It is desirable that you demonstrate your usefulness and value to the participants at an early stage. Arrange the programme so that, early on, you will make a useful input which the participants will value - even if it is brief. In all of this, try to be a leader and a facilitator <u>through your format</u> rather than by acting as a different person from your natural self. Artificiality seldom succeeds - and often introduces complications.

86. Be sensitive to the reactions of the participants throughout the entire programme:

- listen to what they say, trying to understand them and their feelings;
- always be ready to respond and adjust;
- reinforce their contributions, and show that you value them;
- encourage and offer hope where this is justifiable;
- ride out antagonism without fighting it, but rather by taking it seriously and trying to appreciate its origins;
- resist demands to be prescriptive or to oversimplify, since these solutions will not resolve the problem which led to the demand;
- make no changes unless you know why you are making them and have thought through the implications.

87. Although you will have tried to ensure that any task which you present is simple, precise and clear, you should always check that it is understood. Usually it is better for tasks to be written, either on paper or on a transparency for the overhead projector. Work out beforehand how you will confirm that the participants have understood - and how you will correct any misunderstandings.

88. If there are to be two facilitators, beware the pitfalls of working in a partnership. This arrangement is not an easy way of covering for the weakness of your partner! It is a particularly demanding style of working in which the two must genuinely act as one. Each of the pair

should have separate functions, which are clear to both. A change of facilitator should thus coincide with a change in the function or role which is called for by the programme, and should not merely be a change of face or voice to provide variety or relief. At any time, one of the facilitators should be in charge. It should be apparent to all concerned that he or she is the person who will respond if any adjustment to the intended programme is necessary. However friendly the pair may be, they should not laugh or smile while in conversation with each other. Sensitive participants will almost certainly feel that the facilitators are laughing at them.

89. Every activity in the sequence should have a definite beginning and ending. Avoid running activities so that they may be felt to dribble off into incoherence. Work out how to make it obvious to all the participants when an activity is complete, even if this takes place at a different point in time for different participants.

90. Plan consciously to involve all the participants throughout the programme; and arrange your style to allow you to attend in some way to all the questions which you will be asked, even if they are unanswerable.

91. It is virtually impossible to maintain effective contact with all members of a group of more than 12 or 16 participants. This becomes even more difficult when the group splits into sub-groups in order that most may have a chance to participate. In these circumstances you should plan to undertake 'whistle-stop tours' in which you circle round the sub-groups, making contact with each of them. You should explain at the beginning that, when you are doing this, you expect the groups to carry on unless they have a specific query or problem. They should not stop or wait to see what you are going to do or say, or, worse still, interrupt their proceedings and summarise for you what they have been doing. The purpose of your visits is normally to check that all is well and

perhaps, occasionally, to make a contribution if you deem it appropriate.

92. You should make some provision, preferably in the early stages of the first event, to identify the expectations which the participants have of the programme (and prepare yourself to respond to unsatisfied expectations at a later stage).

93. If you will be setting time limits and trying to keep the participants within them, consider using an electronic or kitchen timer rather than a voice call of 'time up' at the end of the time period. The voice call can make some of us sound like a sergeant-major, or a nuisance. An electronic or mechanial device is somehow accepted as an external irritant!

So much for the decisions and actions which you can anticipate, or try to anticipate. However, we should also consider what to do and how to react when behaviour occurs during the event which you have not anticipated and which then calls for an ad hoc decision.

The event itself - and your reactions to what happens within it

94. If you are familiar with problems (and solutions) similar to those which are aired by the participants, make it clear that you have this experience. This will demonstrate your right to exercise the role which you hold; and the illustrative examples which you quote may well be useful to the participants at the same time. But it is not necessary for you to occupy centre stage every time a problem arises; it will generally help the group if you facilitate discussions in which they can work towards their own solutions to their own problems.

95. Sometimes you (and the group) will find it helpful if you turn questions back - either to the individual who asked them, or to the group. Indeed there will often be participants within the group who will be glad to make a

useful response and who will do so at least as effectively (and acceptably) as you could. This is a style you could well practise beforehand, in other types of meeting.

96. Your responses to statements by participants will often be expressed as facilitative questions. Wherever possible, avoid asking questions to which only one member of the group will be able to make a response. Instead try to ask questions which call for a range of responses. Better still, use methods sometimes which encourage each participant to make a small overt or covert response, perhaps in the form of a scribbled note on a piece of scrap paper. You can then ask them to share their thinking with a neighbour or in a small group, before the activity is resumed in plenary. In this way you can encourage everyone to think and to review what has been said.

97. You should always be willing to respond to questions as they arise - provided they are relevant. But be equally ready to put off answering when the question is not relevant. Accept the question and log it for response later.

98. Sometimes in an activity you should encourage the participants to reflect on the process they are following. You can do this either by asking a question or by mirroring what the participants are doing and asking them to reflect on your factual report of what is happening in the group. As they reflect, instead of simply accepting their statements, you should seek elucidation by framing follow-up questions and asking them to find for themselves examples to illustrate their conclusions. For it is important that participants work out for themselves the procedures which they should be following - because these are personal and will never be more than superficial unless the individual has created them anew for him or herself.

99. Any group of people who do not know each other, or who know each other in other circumstances, will take a while to settle in before they are ready to work as an interactive group or in a self-help mode. Negative feelings may be forcefully expressed while this is happening. This is not uncommon and is not in itself a cause for concern. On such occasions you must carefully investigate the possibility that concealed personal reasons underlie the expression of feeling. If so, they are likely to be relevant to your subsequent professional relationship with that particular individual. So it is worth trying to unravel them - sometime, but probably not immediately.

100. Challenges to your authority may present you with acute problems about how to react. Beware the participant who quibbles, and particularly one who questions the wording of a task when he or she is really introducing a distraction in order to avoid a challenge. You must be firm in this type of situation, or you will lose your facilitative authority with the group. You must also be firm gently - or you will give an impression of being dictatorial.

101. It is important to gather as much information as you can before you make a response to a challenge, because these usually arise for distinctly convoluted reasons. Do everything you can to learn about body language, and to notice it. Learn to watch all the group members - and to identify and interpret their reactions. Watch where and how everyone sits (and consider, of course, where you wish them to sit and how you will arrange that as unobtrusively as possible).

102. That leads us on to comment on your style, and its effect on the group. Be conscious and aware of what you do, how you do it - and why. Try, for instance, to vary your voice tone; and do everything you can to make the tone appropriate to the role which you have to take up at a particular time. Firm statements, for instance, sound

much less authoritarian when expressed in a gentle voice and in short sentences.

103. Make sure that you maintain brief but significant eye contact with as many participants as possible while you are talking. If you must refer to your notes, do so only after you have finished a statement and before you begin the next one. Don't kill the impact of a statement by looking down at the end of it, or by failing to 'grab hold of your audience' in visual contact at the beginning of it.

104. Even in the later stages in the programme you should always be sensitive to signals that there may be further needs to be identified or specified by the participants. Try to find a way to accommodate these needs, either within the programme or by some provision (perhaps individual) outside it - if that is at all possible. At the very least, acknowledge these further needs and show that you value them.

105. Nevertheless you must accept that some needs will always prove impossible to satisfy. Some participants will be incapable of developing as they would wish; some needs cannot be catered for from your resources; and some participants will make inappropriate or unacceptable demands. Don't feel obliged to attempt the impossible; don't apologise for not doing so; and don't become irritated or (worse still) express that irritation if unrealistic demands are made on you when you attempt to identify total patterns of needs.

Afterwards

106. Immediately after the event, we strongly advise you to debrief in detail on the process which you have followed. Try to have someone to talk it through with; if that is not possible, make your own distinctly detailed factual records. At first you should concentrate on reporting the data. Then once you are ready to analyse, you should look for models, patterns and generalisations which can

be made about what you have been doing. It is difficult but not impossible to do this on your own; but even a half-baked effort is better than nothing, because it will enable you to plan more carefully, based upon your experience, in the future.

107. Only after that analysis is complete should you permit yourself to react, to formulate opinions, to make judgements about what you have done and to reach decisions about what to do next or next time.

A postscript: the ultimate source!

108. If you want to be a truly effective facilitator in learner-centred activities, we sincerely advise you to

- read Freedom to Learn for the 80s (by Carl Rogers) before you start;
- read it again, after you have a fair amount of experience;
- avoid the original version of the book (excellent though it is). The 1969-73 edition has much less to offer than the more recent and completely rewritten text.

SECTION IV: IMPROVING A CONVENTIONALLY TAUGHT COURSE IN A CPD PROGRAMME

Sometimes you may be obliged to offer a CPD course in a traditional mode. If so, then do not despair. You can still make the activity to some extent learner-centred; you need not necessarily abandon all your efforts to concentrate on needs; and generally you can integrate what you are doing with the total pattern of development for each individual, if you make a special effort to do so.

In this section we set out a few thoughts on how this can be done if your programme is unalterably set in a conventional mould.

109. It is imperative that you believe it is possible to increase the effectiveness of conventional CPD courses within the established format. This can be achieved, to a considerable extent, by:

- designing the course so that it will identify and meet some relevant needs, and will have sufficient flexibility to permit some revision or the incorporation of additional ideas;

- implicitly demonstrating the relevance of what is to be offered in the way it is presented and mastered;

- basing what is done on the needs and aspirations of the learners;

- harnessing the past experience of participants.

110. For example, you could:

- find out the expectations and needs of the participants, as they each discern them, before the programme begins;

- indicate your aims, in relation to these expectations;

- tailor or adjust the programme which you are presenting, to respond as far as possible to these expectations and needs, and to make it clear when you are trying to do that;

- find out about methodological innovations used elsewhere in CPD courses, and plagiarise them for good ideas which can be incorporated, in part at least (perhaps in coursework or tutorials);

- indicate to participants how they should approach those of their expectations and needs which will not be resolved in your programme.

111. It is obviously desirable to introduce some activity which will identify relevant experiential learning (even if this has to be done in the participant's own time). You can then try to draw on the experiential learning within your subsequent programme. If some of the participants can contribute usefully, it is likey to be valued more by the other learners than if the same input had come from you!

112. Learning will always be much more effective when the learners are active, and especially so when they have brought significant experiential learning to the course. So make sure that there is as much provision as possible in your programme for active group work; and reduce the amount of instruction or explanation below the norm for conventional courses.

113. Arrange for the active learning (whether it is within the formal programme or not) to consolidate learning first and then to develop each participant's ability to apply what has been learnt. If they do not reach the stage of being able to apply knowledge and understanding, then all the effort by you (and by them) will have been virtually worthless.

114. It is useful to plan and move deliberately towards distinct outcomes - even in a course which is predominantly instructional. Distinguish for the participants those outcomes which were included in your original course plan, and those which have been introduced as a result of identifying their needs. This will help them to see the course as a response to their needs, rather than as something planned in a vacuum beforehand.

115. Whatever happens, make an effort to structure your programme somehow to cater for the inevitable and major differences between learners. If you do not do this, it will inevitably be unsatisfactory for the majority.

116. Even when there is no formal examination, you should do all that you can to measure and identify the outcomes and the learning, so that you know what you have achieved. And you must not leave this ingathering of feedback until it is too late for you to react to what you learn from it. Obtain your feedback at a point in the programme which allows you time to introduce remedial measures if you have been less successful than you imagined. They will be appreciated - and will be worthwhile, for you and for the learners.

117. If you are trying to break away from the conventional format you must be willing to switch roles. Admittedly, on a great number of occasions you will have to be a teacher, giving information. But at other times you should arrange to be a facilitator who will respond to what the learners tell you and each other, and will question them so that their understanding deepens and is consolidated by the activity which is generated by your questions. And sometimes you should also be tutor, a counsellor or a resource person. Consequently you must make it clear to the participants, through the structure of the event, which role you are adopting at a given point in time.

118. Finally, you may find it useful to search through the advice to facilitators which is given earlier in these notes, looking for ideas which may also relate to your work in the more conventional situation.

SELF HELP!

You will, of course, learn mainly from experience. That development will be a natural part of you - and you will be tempted to assume that it cannot (or need not) be strengthened by conscious and separate action on your part.

We have found it useful to take time to pinpoint what we have learnt, particularly during a debriefing session - and to express it concisely in writing as a way of clarifying and consolidating our thoughts. We find that it increases our awareness of the process and enables us to improve our competence in extracting general truths from specific experiences.

We suggest that you should somewhere keep your notes of the learning which we have not covered, and which emerges in your experience as relevant to you. We honestly believe that you will find that this apparently pedantic recording of experiential learning will prove useful as the months pass by. It will also provide you with a helpful record of additional points which you may wish to pass on to a less experienced colleague - or perhaps to us!

APPENDIX: EXAMPLES OF WORKSHOP PROGRAMMES - WITH NOTES ON THEIR DESIGN

The three detailed examples of annotated workshop designs which following will, we hope, illustrate at least some of the points we have tried to make in the handbook.

Each example is accompanied by samples of documentation, for use by students or staff as indicated. In each case, after the opening description, we also provide a summary of the process followed in designing the workshop. That summary has been written solely for the purposes of this handbook, to exmplify the generalised advice we have given here.

WORKSHOP DESIGN EXAMPLE 1: 'Declaration of CPD Needs'

Starting-point for design: A definite statement of the aims which should be achieved in this, the first workshop of a series.

Background information

Aims: In order to devise subsequent activities for a CPD programme which would be personally relevant for all participants, it was considered essential to obtain statements of:

- background and relevant experiential learning
- needs
- constraints
- potential and aspirations for each participant in the group.

The participants were likely to be an unpredictably mixed group.

The desired outcome was specified at the start of the design (being implicit to the aims). In then remained unchanged thereafter, in the form stated after the 'starting-point for design'.

The designer's main problem was that although the task was a necessary preliminary to the subsequent CPD programme, it was unlikely to prove particularly motivating for participants. They might well feel that they had covered much of this ground before - even if they had not. It was therefore critical to be seen to provide distinctly more than 'yet another chat shop' for well-aired aspirations and frustrations.

It was thus almost essential to give most of the participants hope that effective help could be made available to them - and would be arranged, in part at least, by the CPD staff.

It was also desirable to demonstrate ability on the part of the staff to cater (as well as possible) for participants with unusual needs or circumstances.

Basis of outline programme

Four factors influenced the drafting of the outline:

i) It seemed that a central activity should be the production in writing of full group lists of needs. This should ensure ample coverage of points which might be missed by an individual participant if working alone, and would also create an atmosphere of security or fellow feeling amongst those with common needs. From these group lists, individual statements could then be abstracted and possibly refined and developed.

ii) Nonetheless, since this was to be an opening workshop, provision had to be made for ritual beginnings - hopefully linked smoothly to the productive activities which followed.

iii) Participants should be confident about the effectiveness of the programme. Even in the opening event they should feel that they are receiving something worthwhile, as well as

providing detailed information about themselves.

iv) The workshop could then finish on a positive and hopeful note, pointing forward with optimism.

Rough outline of workshop

1. Introductions:

The project - a brief overview is given.

The facilitators then present themselves and their relevant past experience. They invite participants to pair off with someone unknown to them before the workshop began, with whom they then exchange relevant information. The participants then introduce their partners to the group.

2. Recording:

Participants now fill in curriculum vitae (CV) forms for their partners, with the relevant data which they have obtained so far.

3. Amplification:

Again working in pairs, participants expand the 'interview' experience, this time using pertinent questions concerned with professional background and expressed aspirations. There is no reporting on this occasion to the group, but the CV forms are again completed by partners (to encourage brief reporting and pertinent abstraction of data).

(Output: CV forms with personal data)

4. Regrouping:

Facilitators collect CV forms and quickly skim read them. They identify rough groupings of participants with similar needs and put up 'billboard' descriptions of

typical need patterns - inviting new groups to form under the appropriate heading. They pass out the CV forms to be interchanged and read within these groups, which may then subdivide or re-form if they find the members have significant differences.

5. Definition:

Groups now brainstorm detailed lists of:

- constraints
- needs
- aspirations
- prior (experiential) learning

seeking common ground as well as individual differences, and expressing both as specifically and accurately as possible.

6. Interaction:

The summaries are displayed on flipcharts, participants being free (or even encouraged if necessary) to move around and regroup.

7. Personal statements:

Each participant now:

- selects flipchart headings (from any source) which apply to her or him individually;
- amplifies these, with a reasonable amount of helpful personal detail;
- modifies or amplifies the data already entered on their CV forms by the previous partner (if that appears necessary).

(Output: Completed individual statement)

8. Response

A facilitator now responds to the group statements by:

- indicating how such needs will and can be met in the next workshop(s) (this must be a quick summary in plenary, pointing forward);

- issuing more detailed and specialised follow-up handouts, which give information and may require individuals to carry out some preparatory work before the next meeting.

Outline of the design process

The planning of this outline was not carried out in a linear or chronological sequence.

The design began with the fairly rigid requirement to generate individual lists of total needs, together with statements of other relevant data, on an individual basis. It seemed unlikely that this task could be undertaken immediately, without the 'loosening up' influence of meaningful conversations in which felt aims would eventually be expressed, to people with whom it had become somewhat easier to exchange mild confidences.

These thoughts prompted the idea of preparing group or joint statements, as in Item 5, which would emerge from task-centred discussion and would lead to an opportunity for reflection (Item 6) before the participants committed themselves to personal statements (Item 7).

With that part of the sequence tentatively established in the heart of the programme, it seemed necessary to give thought to the inevitable ritual introductions at the beginning (Item 1). From there it was simple to introduce a smooth and fairly natural transition to personal conversations with a purpose appropriate to the workshop aims (Item 2).

Throughout the drafting, the statement of aims for the workshop was little changed, although it was slightly refined and extended as the outline was created. It was, to be honest, only during the planning that it became apparent that the production of written individual records (Item 3) would be feasible, and would make the output more informative, useful and easily handled by the facilitator.

Having built in the essential design requirements in a somewhat humdrum scheme, it seemed increasingly important to freshen up what could easily be regarded by the participants as a boring or somewhat dead activity. For that reason the designer now introduced the organisational dodge of 'regrouping' (Item 4) which was a valid activity, but had the added attraction of introducing novelty, movement and informality.

It only remained to fill out the detail and streamline the various component activities to fit together and to satisfy or include all the desired features of the aims. It was at this stage that Item 8 was added; and some thought was given to making this brief activity both useful and motivating, placed as it was towards the end of the workshop.

WORKSHOP EXAMPLE 1: Staff Outline Notes

Duration: two hours

Two staff members participated, but perhaps not essential

Note: In workshop planning and in detailed notes such as these it is highly desirable to estimate timings in as much detail and as accurately as possible. That involves building up a total estimate of time from separate estimates for each component of the programme.

These estimates are to some extent personal to the members of staff concerned, and to their way of working. It is therefore not felt to be helpful to include them throughout the documentation of this example, or of the two that follow. Block estimates of time are therefore quoted - but for those who may be interested, an excerpt is given later, setting out the detailed estimates from which the block figures in this example were obtained.

Introduction and opening task

(Staff 1)	Introduces self (OHT 1)	
	Passes to colleague who introduces self Back to Staff 1, who outlines the project Explains today's aims	8 mins
Task 1:	'Meet your partner (a stranger, please)' (OHT 2)	
	(If group is an odd number, Staff 2 acts as a 'pair')	

Asks participants to introduce partners to the total group - 'in half a minute!' 18 mins

Issues CV forms Part 1

Asks participants to 'fill in this form about your partner'. They may check with their partners if they wish - but should only do so later.

(5 minutes only)

To illustrate desired style/amount of response in the next stage of the event, facilitator demonstrates sample pertinent questioning of a participant with regard to personal background and expressed aspirations

(OHT 3)

- moving from one participant to another with successive questions

- filling in specimen summary answers on an OHT of the CV form.

Issues CV form Part 2.

Participants obtain information from their partners and fill in forms for them either during or after the dialogues between them. 26 mins

(Total time so far: 52 minutes)

Coffee 15 mins

(Staff 2) During coffee collects forms and skim reads them.

Identifies meaningful groups and finds short informative 'labels' to describe them.

Marks up these labels on flipchart sheets.

Regrouping and group task

(Staff 2) Lays out forms on tables, to be collected by subjects (not authors)

Quickly suggests rough groupings of needs and aspirations and indicates how the headings on the flipchart sheets describe these groupings.

Sticks flipchart sheets up around the wall and invites participants to group themselves appropriately.

Divides any large groups (more than six) into two or more indepdendent groups.

Now issues Task 2: Groups to brainstorm master list of needs. (OHT 4)

'Whistle-stops' around the groups making sure that everyone is reasonably comfortable in their group by identifying with most of the listed needs and aspirations.

Allows any indvidual who feels strongly different to work on her or his own - but doesn't encourage unilateral declarations of independence merely because of a few differences of opinion.

Reminds groups of deadline timing.

Prompts groups to produce and display master lists. 27 mins

Personal statements

(Staff 1) Declares Task 3: 'Find the points that fit you and amplify them to a personal statement on CV forms Part 3'.

Participants fill in personal responses.

(A deadline reminder will again be necessary)

Collects and staples forms (with assistance from Staff 2)

(OHT 5) 14 mins

Response

(Staff 2) (Having moved round the groups during the previous stage, and made ad hoc preparations in terms of main needs and the emphasis in discussion)

Mentions brief examples of how some of the needs can/will be met. (Participants still with their groups).

Now issues follow-up handouts, where available and applicable, to appropriate participants. These handouts to cover predicted needs patterns. 12 mins

Closure (informal)

(Staff 1 & 2) Make similar (or at least some) arrangements with non-standard cases, on an ad hoc basis - after the formal close of the workshop.

(Total time for workshop: 120 minutes)

WORKSHOP EXAMPLE 1: Details of breakdown of timing for various blocks

Staff outline notes

In this extract from the outline notes we show how we build up estimates of block timings. We do not expect or attempt to adhere to short component timings. But they are the basis of our estimates - and gross inaccuracies 'during the event' are worthy of scrutiny and consideration.

	Timing (Minutes)
Introduction	2
Passes to colleague	2
Staff 1 explains project	3
Explains aims for today	1
Meeting partners	2 x 4 = 8
Participants introduce partners to plenary	16 x ½ = say 10!
Participants fill in CV form - Part 1	5
Illustrates what is wanted in Part 2	5
Participants obtain information for Part 2	2 x 8 = 16
Coffee	15
Quickly suggest rough groupings	4
Now presents Task 2	3
Prompts groups to produce and display master lists	20
	4 + 3 = 27

Participants fill in personal responses
Collects and staples forms ... etc.

WORKSHOP EXAMPLE 1: Staff Reminder Notes

Members: Approximately 16 participants (with problems in pairing if there is an odd number).

Furniture & seating: Flat-floored room - set out initially around a central table or tabling, but with spare space to enable the participants to move out into informal perimeter groups.

Separate table for handouts - behind presenters and not readily accessible to late-comers.

Equipment: Overhead projector and screen

Flipchart sheets, marker pens, blutack

Stapler and spare staples

OHT pens

Prepared and spare OHTs

Transparencies:

1. The project - main features.

   Today's aim.

2. Task 1: Find out about your partner.

3. Part of the CV form (with an overlay for responses, so that it can be removed and the transparency reused).

4. Task 2: Brainstorming master lists.

5. Task 3: Abstract the points that fit YOU, and amplify them.

Handouts: CV form - Part 1

- Part 2

- Part 3

(Have spares in case some are spoiled or need to be rewritten)

WORKSHOP EXAMPLE 1: Tasks

Task 1: In a total time of 8 minutes:

1. Choose a partner whom you do not already know.

2. Tell him or her about
   - your academic and professional qualifications
   - your present employment
   - why you are here and what you hope you can achieve in the near future in terms of your professional development.

3. Find out the same information about him or her.

Task 2: Prepare group lists of:

1. What you need in order to progress professionally. (Restrict yourself to items where the workshops may be able to help!)

2. The constraints which inhibit your development.

3. Your relevant experiential learning.

4. Aspirations, targets or specific developments which you would like to achieve.

(Differentiate somehow between answers which represent the views of the majority and those which come from a minority within the group).

Task 3: Pick out the points from the group list(s) which are relevant to you.

Amplify them, as the CV form requests.

WORKSHOP EXAMPLE 1: Documentation - CV Forms

PART 1: Headings (to be spaced)

- Name
- Present post and job description
- Academic qualifications
  - secondary
  - tertiary
- Professional qualifications
- Immediate target(s) for personal development

PART 2: Headings (to be spaced on the CV form, although not here)

What professional development do you hope for in the next - year?
- 5 years?

What experience do you have which gives you a sound start in that direction?

What experience do you need?
What knowledge do you need?
What abilities do you need?

What do you see as being the greatest problems or obstacles which you will encounter in achieving development?

What development does your employer wish you to undertake?

Which of your aspirations are not supported by your employer or your superiors?

PART 3: Headings (again spaced)

Now specify, in order or groupings of importance:

1. Your immediate developmental needs.

2. The constraints which will affect/limit your development.

3. Your achievement so far in relation to your aims.

4. Your personal development target(s).

WORKSHOP DESIGN EXAMPLE 2: 'Preparing a Mature Candidate's Report for a Chartered Engineering Institution'

Starting-point for design: An idea which might be useful as a productive activity.

Background information

The participants should all be potential 'mature candidates', seeking chartered status in an engineering institution.

The design outcome was not determined in detail until a late stage in the design process. The outline of the workshop programme was built up initially with a vague intent to be helpful, informative and encouraging to the participants during the first meeting with them. As the design progressed, it seemed feasible to:

- assist participants to confirm their suitability (or otherwise) for the mature candidate's route;
- ensure that they fully understood all the relevant requirements;
- help them to find a possible topic for a viable proposal for the mature candidate's report (which is the main demand in this route to chartered status).

That (eventually) became the three-part goal of this introductory workshop. But it is important to appreciate that the third goal was added during the planning stage, as the potential of the design became apparent.

The designer's main problems had been identified during a series of pilot interviews with potential mature candidates. It seemed likely to prove extremely difficult to:

- unearth relevant suggestions for report topics;
- obtain basic information about work experience;
- exclude long and irrelevant narratives;
- satisfy the keen need which potential candidates obviously had to establish respect in the eyes (or rather ears) of their listeners and peers;
- cope with the fact that most potential candidates had too little self-confidence, while a few (perhaps also in that category) would behave as if the reverse was the case.

All these problems were expected to escalate in workshops.

The initial idea

Some of the pilot interviews had suddenly become productive when an interviewee responded informatively to a 'trigger question' which constructively initiated useful recall and reflection. Although it had been found that the same question could prove non-productive when used with another interviewee, it seemed worthwhile to introduce successful trigger questions into interactions between participants. At the same time it would obviously be necessary to look for ways to enable participants to move quickly from questions which proved unproductive for them.

The tentative basis for part of the outline was therefore to:

- use trigger questions which had worked in individual interviews to generate individual lists of potential report topics;

- anticipate that some questions might not prompt constructive responses from some of the participants and therefore plan activities in which it would not then be possible for the programme to flag;

- maintain a mood of optimism throughout and at all costs avoid the outright rejection of any suggestions for report topics made by participants - even when these were quite unsuitable;

- end with a 'homework' task which each participant should be able to carry out reasonably well - and would regard as a significant step forward;

- enlarge the aims for this first workshop to include at least part of what finally became the third in the list above.

Rough outline of workshop

1. Introduction

Facilitator makes brief mention of self - with some authority and some confidence, since these qualities are likely to contribute more to a group of insecure people than an emphasis on friendliness.

Specifies what the mature candidate route is, in the context of what the workshop programme will hope to achieve.

Ensure (if possible) that the main requirements are headlined. It is unlikely that they will be properly grasped first time round, but it is nevertheless vital to begin with clear and accurate definitive statements to which reference will be made again and again.

Invites candidates to confirm their suitability, aspirations - and limitations (without quite putting it that way).

Pairs off the participants (and if there is an odd number, forms a trio).

Leaves them to introduce themselves to each other, and exchange reactions.

2. Trigger questions - explanation

(Makes no attempt at introductions within the group during these initial stages - unless only a small number are involved).

'Volunteers' a participant (from the trio, if there has to be one).

Tries out one or two trigger questions on the volunteer.

Makes notes of responses on OHP, in the desired format.

Explains the procedure to the volunteer and to the group.

Repeats with different questions and another volunteer.

3. Trigger questions - peer interaction

Issues sheets with the full range of trigger questions to be explored - with each participant questioning and answering before the pair move on to the next question.

(Output: A list of responses for each participant)

4. Input and appraisal

Explains in detail the requirements for a mature candidate's report, one by one.

Gets the participants to add notes to their suggested topics on the lists which have been obtained earlier, giving some indication of their appraisal of the possible topics - IN THE CONTEXT OF THE STATED REQUIREMENTS.

The criteria can be expressed colloquially:

- Choose the topics you feel confident about - and indicate those about which you are not so confident.

- Which ones offer you the opportunity to demonstrate your grasp of 'basic principles of engineering science'?
  (Checklist 1: Facilitate, or demonstrate criteria)

- Which ones will or could lead to reports which would be 'little more than mere regurgitation'?
  (Checklist 2: Facilitate, or demonstrate criteria)

- Which ones will enable you to demonstrate 'depth of understanding'?
  (Checklist 3: Facilitate, or demonstrate criteria)

(Output: A choice of the three apparently most suitable topics by each participant)

5. Interaction and cross fertilisation

Participants form groups of three or four.

Working from their selected lists of 'three best topics', they advise each other about the best prospects on each list.

6. Further input

Facilitator explains the essential components of a good summary.

Participants immediately begin to draft one-page summaries for their chosen topic.

7. Responses

Facilitator makes a response in plenary to one or two (potentially promising) summaries or titles, in terms of what to do next:

- to the summaries
- in preparatory work for the report itself.

It is essential that the mood of this part of the workshop is positive. The facilitator must not choose unsuitable topics for comment - and should not mention at this stage that some topics are or might prove unsuitable. The key component of the response is to fill out the detail of the comments in a way that will exemplify what should be contained in a good summary.

8. Closure

Indicates that other responses will be made individually before the next workshop.

Collects documentation from each participant, making sure it has a name on it.

Makes self available for questioning, since some participants are almost certain to have been reluctant to volunteer all their questions in the plenary.

Outline of the design process

In this example the design process was distinctly iterative; the programme and the aims developed from the somewhat nebulous idea of building on 'trigger questions' which had really been the only positive feature of a fairly depressing set of pilot interviews. And the first two aims, which might have been given prominence in a design based on and emerging from the tentative statement of aims, were to receive less and less emphasis as the iterative process proceeded.

The draft plan began from the vague, and at that stage not entirely relevant, desire to build on the 'trigger questions' and find a way to use them in such a way that a staff interviewer was unnecessary. This led to the interaction in Item 3. A means then had to be found to create the equivalent of corrective dialogue with an interviewer, during which less suitable (or unsuitable) ideas could be gently set aside, while better suggestions would be refined in accordance with the specified requirements. This also had to be planned in a form suitable for group use (Item 4).

Difficulties were anticipated in explaining what had to be done in this part of the workshop. There was a clear need for both explanation and coaching. That was planned (Item 2) and preceded by what seemed an appropriate but not distractingly long introduction (Item 1).

It was not immediately apparent how far a workshop might be expected to progress from these trigger questions - or, indeed, in precisely what direction they would move. An estimate of timing suggested that Items 1-4 would take more than two hours to cover, yet would still not leave the participants with sufficient feeling of having made tangible progress. The early planning had presumed a duration of only two hours for this workshop, but a further design iteration explored the possibility of using more time, thus attempting to make more progress by filling out the detail of the potential report topics.

The aims were therefore firmly expanded to include the third one, which called on participants to explore the usefulness of what they were producing and to eliminate some of the more obvious weaknesses therein, without the delay of waiting until a subsequent workshop (Item 5). It seemed possible and useful to introduce tentative summary drafting (Item 6), followed by a further opportunity for the facilitator to exemplify the requirements of this route to chartered status (Item 7) and so to redefine the aims and purpose of the workshop.

The possibility that a lot of back-up work might be required of some candidates before the report itself could be drafted was anticipated, but was deliberately to be left unsaid - to maintain the planned optimism of the closure (Item 8).

WORKSHOP EXAMPLE 2: Staff Outline Notes

Duration: three hours

One facilitator only

Introduction

Introduce self (in style to inspire confidence in the uncertain participants)

Define the mature candidates route and its entry requirements. (OHT 1 + handout)

Invite questions.

Explain today's aims. (Overlay) 16 mins

Pair off participants to introduce themselves to each other. Form a trio if there is an odd number.

Trigger questions

Pick a participant (who remains seated).

Ask a trigger question, and begin to explore the participant's answers.

Summarise the responses on an OHT.

Comment on the procedure. Issue blank sheets and encourage pairs to try out the first question on each other, and to generate as many topic ideas in response as possible. 14 mins

(Help the trio, in order to enable them to stay within the time).

Don't worry if some groups 'dry up' a little before others - or if you proceed before everyone is finished. 12 mins

Now display the other trigger questions. (OHT 2)

Exemplify a further one with another volunteer, if that seems appropriate.

Leave the participants to go through the remaining questions at their own rates. (Tell them that duplicate responses, emerging from more than one question, need not be rewritten or reiterated - unless they feel that the second statement is more helpful or slightly different from the first).

'Whistle-stop' constructively and supportively around the pairs during this part of the activity. As you do this, be prepared to give examples of typical answers, in order to illustrate what you are looking for. But do not illustrate too directly, or the participants are likely to imitate these model answers. 48 mins

(Output: Individual lists of suggestions of topics for the reports)

Coffee

Participants should now be encouraged to mix and meet all the others, informally. 15 mins

Total time so far: 105 minutes

Refinement and selection of potential topics

On resumption, ask participants to mark their own list with some annotation scheme which indicates their approval (good/possible/difficult/unsuitable) of the ideas.

Ask questions relevant to the main requirements.
(OHT 3)

'How well do you know this subject?'

'What principles of engineering science does it bring out?'
(List them! - or be prepared to do so before the workshop is over.)

'What can you offer which is not mere regurgitation of someone else's thoughts?' 'What will be specifically yours?'

(Again be prepared to list and specify.)

'How deep an understanding can you show?'
(In what respect?) 19 mins

Explain each demand with examples and non-examples.
Don't discourage informal conversation at this stage.

(Output: An annotation of the list prepared by each participant)

Now each participant should choose the three most favourable or promising suggestions for report topics from her or his list. 4 mins

(Output: Lists of three topics)

Form groups of four and five people.

Participants advise each other on the best

prospect in each list of three. They should each be encouraged to make short statements of what they consider is best on their lists and why, followed by an opportunity for questioning and comments from the others in the group, which should endorse the expressed view or otherwise. 24 mins

While this is going on, keep OHT 3 on - and remind the participants of it when that seems appropriate (as the facilitator eavesdrops on the groups).

Report requirements

Input the components and structure of the required one-page summary which goes to the parent institution.

(OHT 4)

(Issue a handout on this afterwards)

Then answer questions. 13 mins

(Output: A draft one-page summary of a report topic, for each participant)

Closure

Choose two of the better summaries (quickly)

Respond positively - indicate how they satisfy the requirements (reinforcement)

- advise on 'polishing' them

- suggest what could be done next, both in researching the topics and in assembling data 10 mins

Ask participants to add their names to the summary pages and topic lists

Collect in all summaries and lists (stapled) 3 mins

(Output: Lists and summaries)

Indicate that, before the next workshop, each participant will receive individual advice on the proposals which have been handed in 2 mins

The total time for this workshop appears to be 180 minutes, but must be regarded as speculative.

Note: It is highly probable that the timings in this workshop will be disrupted by participants with particular concerns, needs for evasion or defence mechanisms. It is equally important that all the components of the programme should be covered, and that participants are not 'squashed' by the facilitator. It is therefore vital not to guarantee a three hour comple on time, and for participants and facilitator to be prepared for an involuntary extension, possibly of up to 45 minutes.

WORKSHOP EXAMPLE 2: Staff Reminder Notes

Members: 16 - 20 participants (maximum)

Furniture & seating: Comfortable chairs with something on them to be read on arrival, just in case the participants feel awkward.

A flat-floored room, in which the furniture can readily be moved around. An atmosphere of ease and relaxation is vital as participants are likely to feel threatened, however supportive the facilitative style.

An easy-chair for the presenter, with a low table for both the overhead projector and the handouts.

An unthreatening and seated presentation throughout.

Coffee on arrival could be a good idea.

Equipment: Overhead projector and screen (unobtrusive). If the wall can be used as a screen, so much the better.

Hardboard sheets to use as writing-boards (or clip-boards if available) - to avoid the need for tables.

Stapler and staples.

Prepared OHTs, spares and pens.

Transparencies: 1. Main features of the mature candidates route to chartered status, and entry requirements to it.

2. List of trigger questions.

3. List of checking criteria - expressed as questions.

4. Components of a one-page summary.

Handouts:

1. Sheet for individual list of suggested topics for report.

2. Components of the one-page summary.

Other points: There is a strong chance of encountering:

- aggressive defence mechanisms
- evasion of tasks
- negative attitudes
- need for reassurance.

Above all, it is virtually certain that the participants will have strong misconceptions of the requirements of the report topic. Most candidates will be determined to demonstrate the quality of their professional work and the magnitude of their responsibility. It will prove extremely difficult to dissuade them from choosing topics which satisfy these self-determined criteria. But the effort must be made, and made successfully, at this stage - or else problems will escalate for both participants and staff.

Working in a personal style

The trigger questions are only likely to work if they are expressed in your own words, and if you can illustrate them with examples taken either from your own experience or from encounters with fellow engineers.

Be prepared to revise the suggested trigger questions on OHT 2 with that thought in mind - either before the first workshop, or during that workshop, or afterwards.

A comfortable and natural working vocabulary which 'belongs to you' is very important here.

WORKSHOP EXAMPLE 2: OHT 2 - Trigger Questions

Think through the parts of your job which are most demanding. What are the topics or activities where you would say:

'I know a lot about that. That's one subject I have a good grasp of.'

'That job was really interesting/usual/demanding because ...'

'I have often wondered what <u>really</u> happens when we ...'

'What I learned in classes and from books is no real help in the decisions <u>I</u> have to make, such as ...'

'If I was killed in a motor accident, they would find it difficult to get someone to deal with ... as well as I do.'

'Most of my time is spent on ...'

'The profession hasn't really got the whole answer to that problem. I can think of several criticisms of the way engineers deal with it.

'I wish I could ... because ...'

Note the comments on the staff reminder sheet. It is important that these questions are worded in a form which is natural to you, and that you are able to illustrate what you mean by an example, taken either from your own experience or from your experiences in talking with engineers of a similar background to those gathered in the workshop.

WORKSHOP EXAMPLE 2: OHT 3 - Checklists

1. Rate your knowledge of this subject

   - below the norm
   - about average
   - above average (in what respect?)
   - specialist in office or firm (doing what?)
   - highly specialised (in what aspects?)

2. What principles of engineering science does this topic require you to use and/or scrutinise?

   (equilibrium? dynamics? vibration? materials science? - specify!)

   How do you use them? How will this be brought out in your report?

   In this respect, is the topic potentially good/possible/likely to be difficult/unsuitable?

3. What will be included in the report which is not readily available in books?

   What will be the something which YOU will have done?

   In this respect is the topic potentially good/possible/likely to be difficult/unsuitable?

4. What part of this subject calls for depth of understanding?

   How do you use it?

   How will you show it?

   In this respect is the topic potentially good/possible/likely to be difficult/unsuitable?

WORKSHOP DESIGN EXAMPLE 3: 'Enhancing Creativity in Design'

Starting-point for design: The vague idea that the participants at a relativly advanced stage in a workshop series need to be 'jolted' in order to reach a higher standard.

Note: This example is in 'first draft' form.

> The comments which come at the end illustrate the critical, constructive and essentially iterative nature of a workshop design. Several iterations were necessary before this draft was eventually transformed into a reasonable form. It is therefore thought helpful to readers of this text to illustrate the imperfection of the first draft, and the authors' critical reaction to it.

Background information

The participants were a well-knit group who had been taking part in a workshop programme planned to improve their competence in structural designing. Unfortunately they were apparently only trying to augment their knowledge and understanding of specialist information. Yet it was of more importance to enhance creativity and increase objectivity in the appraisal of options.

The desired outcome was therefore to establish the needs for attaining more rigorous and more formative scrutiny of the options generated in the early stages of creative design.

The workshop designer's main problem was that the participants believed that their ability to design was as developed as possible. They were also proud of, and hence sensitive about, their present level of ability.

Therefore, despite the assumed need to improve performance, criticism of present levels of performance could not be presented in a way that would antagonise the participants towards active learning later in the programme.

Basis of outline programme

Note: This workshop takes place at a late stage in a relatively long series of linked workshops on the same theme.

1. The opening

Issue what appears to be 'just another demanding design problem' to self-chosen groups of three.

Task: Generate and select the three most viable distinct design options in response to the given problem. Then select the option with the greatest potential.

(Output: A list of three options, with a preference for one)

2. The first jolt

Call for: (a) the basis for comparison within the list of three;

(b) the justification of the choice of the leading option.

Ask trios to display their findings on flipcharts.

(Restrict the time available, and introduce a mood of challenge)

(Output: Statements)

3. Further challenges

The groups are now required to work as individuals, each having a different task or challenge on behalf of the group. They may confer with corresponding members in other groups, or with members of their own group - except when noted otherwise. But the pressure of time should make such consultations difficult, as each person should feel a personal commitment to completing his or her own task.

Challenge 1: Compare your group's list of options with the 'global' list to be seen by aggregating the suggestions around the room.

Determine what you now consider the three most viable distinct options, from whatever source.

Suggest why your group did not produce these (if it didn't). Explain how your group did arrive at these (if it did)

Challenge 2: Examine and justify the logic of a declared decision by your group (such as the view that option A would cost more than option B, or that option C would be quicker than option D). Work out the costs or the contract time for both options in the case of your own group and in the case of another group which also considered these options. Do this without consulting with the other group, as a member of that group will be doing the same - also privately.

Display the results. State your reaction to the results produced by the member of the other group who did the same job.

Challenge 3: Prepare an honest statement of how you as an individual worked in the initial task - and how you believe your group worked. What criteria were used - and how were they selected?

Justify that as a process.

All the above are to be summarised on flipcharts, for eventual display.

4. Coffee

All participants can now view the displayed statements, which should be hung on the walls.

5. Review

Reconvene in plenary; the staff point out the most striking discrepancies in the displayed material, without comment other than by so doing.

Groups write private advice to themselves emerging from their consideration of this experience, so that they would do the job better next time.

6. The second jolt

i) Staff input a valid option which has apparently not been considered by ANY group. (This demands real staff creativity, but it should be possible since the posted suggestions were conceived under pressure.)

ii) Staff also input a methodology (prime value identification) which could rationalise and improve the process of evaluation.

iii) Finally the staff suggest a combined strategy for creativity, which should go beyond anything generated by the groups.

If any of the above inputs prove impossible, or if the only ideas available are not good enough, the input must be omitted. So the adrenalin should have been flowing for the staff as well!

7. Group work

Now reconvene the original groups, and ask them to specify the needs in regard to the improvement of their design competence. This should take the form of a tight, specific and positive brief (which, virtually, will be a plan for self-directed active learning, although the groups will need to be shown that - later).

Staff must ensure that the groups summarise their advice to themselves in meaningful terms.

(Output: A specific action plan)

8. Conclusion

Staff indicate how these ideas would be built on.

Staff warn that advice will be tested in a subsequent workshop!

9. Joint debriefing

Change the mood: What really were our feelings in that? - ALL our feelings. What kind of attitudes do we need if we are to reappraise ourselves and improve?

(Begin with the staff on each question!)

Outline of the design process

Creation of this workshop centred on the (presumed) need to disturb the complacency of a group of reasonably competent participants, and to convince them that they

could enhance a particular ability. In other words, there was thought to be a need for a 'jolt', although this was neither expressed nor felt by the participants - because they had no vision of the possibility of a step-function in their performance.

A question for the workshop designer was - how should such a jolt be arranged? Could it be presented as:

- a valid challenge?
- a perceived criticism?
- an accepted criticism?

From these questions emerged the vague thought that, in a professional task which did not offer extensive freedom, professionally competent responses should be similar. Consequently it might facilitate self-appraisal to expose and analyse differences between sub-groups of participants, while they were working on such a task.

The 'jolt' of critical self-appraisal should therefore be based on a normal start to a familar type of task, so that there could be no excuses subsequently for the quality of the work being scrutinised. This activity should not dominate the programme; the heart of the workshop should be the stimulus of the confrontation between (relatively complacent) peers - not between participants and staff.

This thinking suggested Items 4 and 5, based on some group commitment (Item 2) to a brief task, which was now emerging in the form of Item 1.

To sharpen the impact of the jolt, it seemed desirable to encourage participants to commit themselves relatively deeply (Item 3) to statements which were then to be challenged. This complex and cumbersome part of the activity, which showed signs of creating problems almost as soon as it was committed to paper, was intended to provide ample grounds for confrontation, which had to be planned to be neither hurtful nor potentially destructive.

Nevertheless it was thought essential that the groups be pressed to react thoughtfully and constructively, which was the thinking behind Item 5.

It then seemed obvious that a constructive reaction should be given to those somewhat mortifying experiences. Equally, by applying the principles of active learning, it was desirable that the participants should create at least part of this response for themselves (Item 5 and 7) and that the staff might mainly facilitate (Item 6) and occasionally supplement (Item 8)

The need for there to be a coming together again of staff and participants after this traumatic and potentially divisive period led to the provision of a deliberate debriefing, in which the workshop would be reviewed as a shared experience by all concerned (Item 9).

The aims, or at least the definition of them, came (almost) at the end! Later the outline was quickly checked over in its present (rough first draft) version to examine its relationship to the declared outcome, and the extent to which the various components were reasonably integrated. This led to the preparation of a list of comments and proposals (qv) to be incorporated in the second draft, after major revision had been planned.

Although the need for that major revision was apparent by the time the draft outline had been prepared, the extent of the weaknesses and complications in the first draft was determined more fully by following through the process of producing draft documentation, including a staff outline (not given here) for a scheme with which it was not intended to proceed in the form described.

WORKSHOP EXAMPLE 3: Staff Reminder Notes - First Draft

'Lull them into a false sense of security'
Begin conventionally in the type of working situation which they have followed in previous workshops.

This will probably involve arranging for comfortable working groups around tables, with the problem sheets waiting there for them as they arrive.

Staff 1 can wander around easily just as they start - and they should then be left on their own with no feeling of unnatural pressure or of unusual attention. Staff 1 then leaves (unobtrusively).

'Let them dig a hole for themselves'

Introduce the first jolt with a new task. Change the mood entirely. Staff 2 now enters and hustles them.

'Allow them to dig in more deeply'

Split the groups into new seatings - with those tackling a challenge being together, although not strictly speaking collaborating. They can probably be placed at central tables, which have been quickly brought in by the staff members who are not presenting.

Call for results to the three challenges on A4 rather than on flipchart sheets. There should be an air of producing group papers for staff though not for public view (although that is not the case and should not be implied).

Any disagreements which emerge informally as the participants tackle the tasks should be probed by sharp questioning from Staff 2.

Staff 1 should be offstage during all this. The central (authoritative) position should be with Staff 2.

'Point out the extent of their difficulties'

The comment on discrepancies and inconsistencies after coffee must be fair - but RUTHLESS. (Staff 3)

Move the groups back into their original trios after coffee.

'Throw them a rope'

Staff 3 should operate in his or her own 'space', in a different position and style from colleagues, and should present his or her ideas neatly and bodly on flipcharts.

These ideas must be convincing and well received. There is no objection to choosing a design problem in such a way as to make this more likely. The same type of design problem is likely to generate inexcusable discrepancies between groups!

Call for briefs which will define how progress can be made.

The 'whistle-stop' role of Staff 1 during the sharpening of the briefs is absolutely crucial.

The findings should be summarised on flipcharts.

'Encourage them as they begin to climb out of the hole'

The valuing of the ideas by Staff 2 must be both genuine and rigorous (even if that means that there is not much to say, because there is not much which is of value!).

'Rescuers and rescued relax together'

The debriefing is to be a shared experience. The staff should therefore sit around, amongst the groups. And a facilitative style must be found which is not authoritative.

Equipment:	No overhead projector. No flipchart stand Materials to be kept out of the room until they are about to be used. Spare tables similarly to be brought in or to be part of the normal scenery.
Staff:	To be out of the room except when involved. There to be no sign of collusion/interaction. The roles not to be overplayed.

WORKSHOP EXAMPLE 3: Comments on the first draft, prior to preparation of the first major revision

(Notes for internal circulation only, to members of the staff group)

General

It is quite clear from the outline and staff notes that this scheme is unacceptable in its present form. There are two major objections.

The first concerns Activity 3 in which drafting enthusiasm has triumphed over common sense.

This activity is intolerably complicated, potentially disruptive and likely to confuse the participants rather than focus their thoughts on one line of action. Since many workshops will attract fewer than 16 participants, and since for plenary discussion it is almost essential to have at least four groups, the participants must work in pairs - all responding to the same challenge. (Three challenges, even if well designed, would be an embarrassment of riches.)

The other major difficulty concerns the second jolt at Item 6, where the staff - although acting from the best of motives - are likely to come across as self-satisfied beings with a superiority complex. This will either generate feelings of resentment and self-justification amongst the participants or will encourage them to leave the initiative with the staff in any subsequent workshops which build on this one. Neither outcome would be welcome.

The outline must be redesigned by making and exploring these changes:

1. Opening

No significant change. Ensure that:

- this opening format has been used in an earlier workshop;

- the chosen design problem does generate a wide line of options, with designers expressing preferences for differing reasons and making glib comparisons;

- the participants (as mentioned above) work in pairs.

2. The first jolt

Keep as in the original draft.

Make the pairs commit themselves fully before publicising the results (which should not be posted at this stage).

Word the 'jolt' task very carefully, to be without ambiguity. If any challenge is possible (even on interpretation) then it will be made by someone who wishes to evade the discerned challenge in the task.

3. Further challenges

This item must be reduced to one challenge.

Allow adequate time for what is to be done.

Break the challenge down into a number of components:

- briefly summarise the procedure which you used to generate the options;

- briefly summarise the procedure which you used to select the most suitable option, clearly stating the criteria which you applied;

- now post your list of options, with the preferred choice marked;

- compare the list of options which your group produced with the 'global' list to be found by looking at the sheets around the room;

- determine what you now consider to be the three most viable distinct options, from whatever source;

- if your group did not produce these, suggest why this should have been so. If your group did produce these, identify where the other groups went wrong in producing their solutions.

4. Coffee

Display statements can be pinned up for all of Item 3. They should provoke both discussion and reaction - informally.

5. Review

Use a similar form to the original suggestion, but with a different purpose.

Begin with a totally objective, ruthlessly analytical and stimulating input from a member of staff, pointing out the more striking differences in the displayed material, and neither making nor implying any judgements.

Allow no time at this point for discussion, the activity moving smoothly on to the next stage, during which the participants will have ample time to respond.

6. The second jolt

This is the most critical part of the entire activity.

The participants must begin to work their own salvation; the learning which takes place in subsequent workshops must be active and strongly motivated.

The staff input here might well be in the mood of an introduction which suggests:

> 'Let's imagine that a similar type of design task is to be presented to this group in a few weeks' time. You want to make sure that each pairing will identify and consider all the viable options and reach an appraisal of them where both the logic and conclusion are acceptable to their fellow participants. You have no idea at the moment of the type of design task which will be presented; it could be in any field whatsoever, and is likely to be an unusual one.
>
> What are the elements of the design process in which you would all like to improve by becoming more rigorous, better informed, more systematic or otherwise more effective, in order to make the most successful attempt to meet the demands of a repeat task?
>
> Specify what you want to be able to do, and how you would identify if there has been an improvement between today's performance and a performance in similar circumstances in a few weeks time.'

The participants are thus being asked to identify

- scope for improvement
- a specific description of what that improvement would be.

They are encouraged to day-dream and be optimistic, without restricting themselves to improvements which they think they can achieve in their own strength. Nevertheless they will still be producing what is virtually a brief for themselves.

7. Group work

This has really become part of Item 6, which is not now a jolt from outside as much as a jolt into a 'higher gear', as far as self-appraisal is concerned.

8. Conclusion

Staff should now respond to the suggestions which have been offered, and immediately pick out those where they feel they can offer appropriate activities in the first workshop to follow. Without responding to all of the items listed, their reaction should be one of optimism - and of acknowledgement that the initiative has come from the participants.

9. Joint debriefing

Omit this from the formal programme, but perhaps arrange for it to happen informally - with those who have a need to stay behind to talk about what may have been a distinctly disturbing experience for them.

Other points

Generate a suitable design brief by choosing a 'one-off' problem of an unusual type. Radically change one of the critical parameters in the situation from which it was plagiarised, without becoming ridiculous.

Participants will have to work in groupings larger than pairs after the coffee break. The nature of these groupings should be carefully considered - there are advantages and disadvantages in combining pairs.

The staffing requirements have been reduced by the revision; Staff 3 (the 'ideas person') is not now required.

The input which follows the coffee break must be effective and must be well prepared. Some of the preparation can

happen before the coffee break, as the opinions and reasoning of the groups become apparent either to an eavesdropper or from the displayed documentation. Nevertheless, thought should probably be given to:

- extending the coffee break;
- using part of it for participants and staff to 'promenade' around the massive collection of Chinese wall posters;
- find some way for the staff member concerned (who should not be consulting with colleague) to be able to display his or her challenges in a succinct way which requires little preparation, but does not introduce 'dead time' in the presentation which follows coffee.

Considerable thought must be given to the roles which are to be adopted by members of staff. These should be taken up naturally, should not involve artificiality or extreme behaviour, should be consistent with the behaviour in previous workshops and should not place either member of staff in the position from which it will be difficult to move into a constructive facilitating role in the next workshop.

Comment

A major revision of the original draft outline is necessary. Nevertheless it seems that an effective programme can emerge, although appreciable changes will probably be necessary in the second draft, even after it has been worked through in more detail.

Conclusion

We make no apologies whatsoever for the fact that the reader has been asked to untangle an imperfect presentation of tentative thinking, within which there are many faults and inconsistencies. Our purpose has been to

illustrate that design, whether it be of an engineering structure or of a workshop programme, is essentially an iterative process. Some of the most constructive ideas in design come as reactions to thoughts which were unacceptable - but whose weaknesses suggested improvements which might lead to a worthwhile solution.

We are firmly convinced that many people despair of their ability to design (again in both engineering and professional development programmes) because they feel that, if only they were good at their job, they would be able to produce something worthwhile at the first attempt. Reference to the literature, and to the work of designers much more expert than the present authors, demonstrates that this is definitely not the case.

We should all accept that design will be iterative and develop our own strategies and tactics for working positively and constructively from the mistakes, weaknesses and unacceptable features which we identify in our early drafts. In that sense the comments which have just been set out, and the philosophy and reasoning which lay behind them, are perhaps the strongest message we would wish to convey from this particular example. Nevertheless we hope it has at the same time illustrated the potential for (eventually) developing a programme from a vague idea.

FEU

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